

ITALIAN SUPERYACHT FORUM

STATE OF THE INDUSTRY

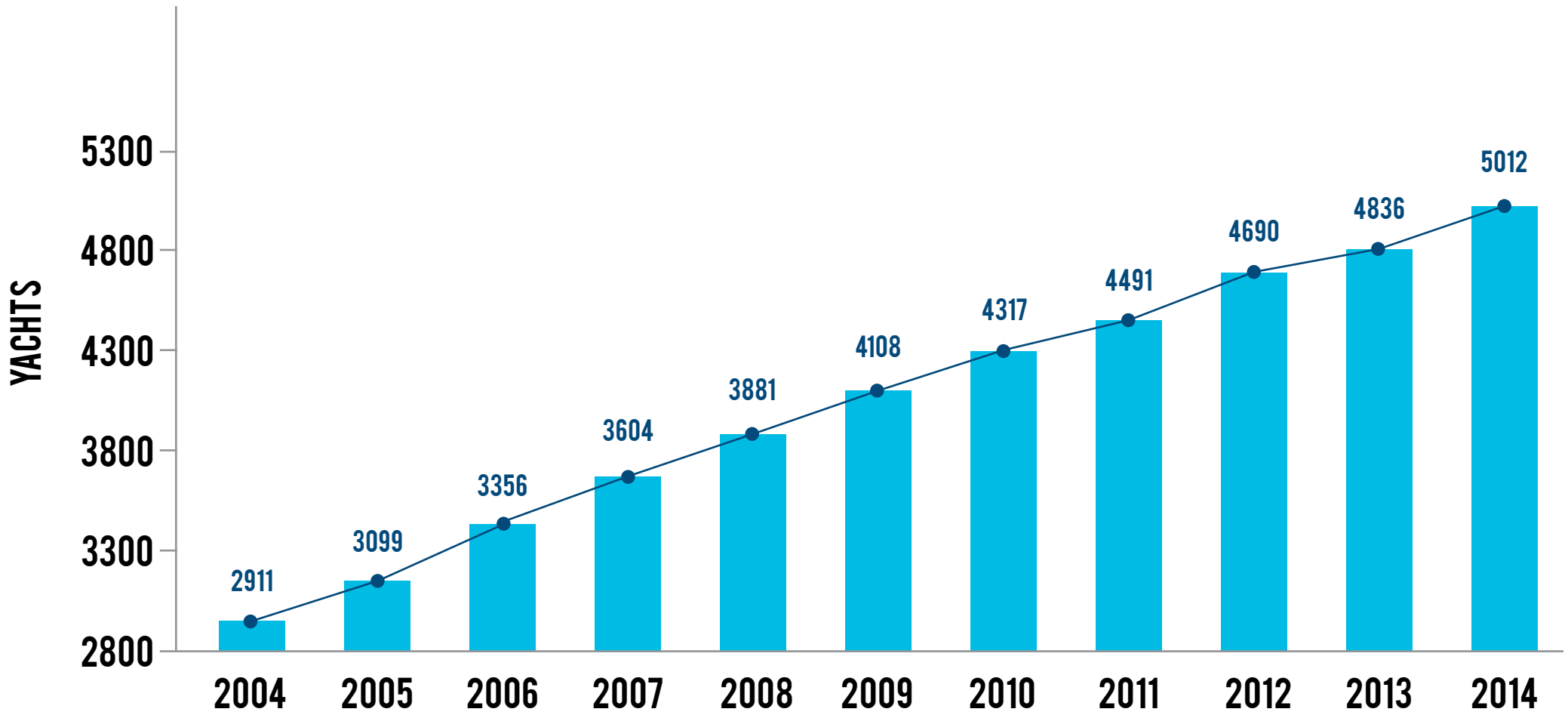
OPENING ADDRESS
BY JUSTIN RATCLIFFE



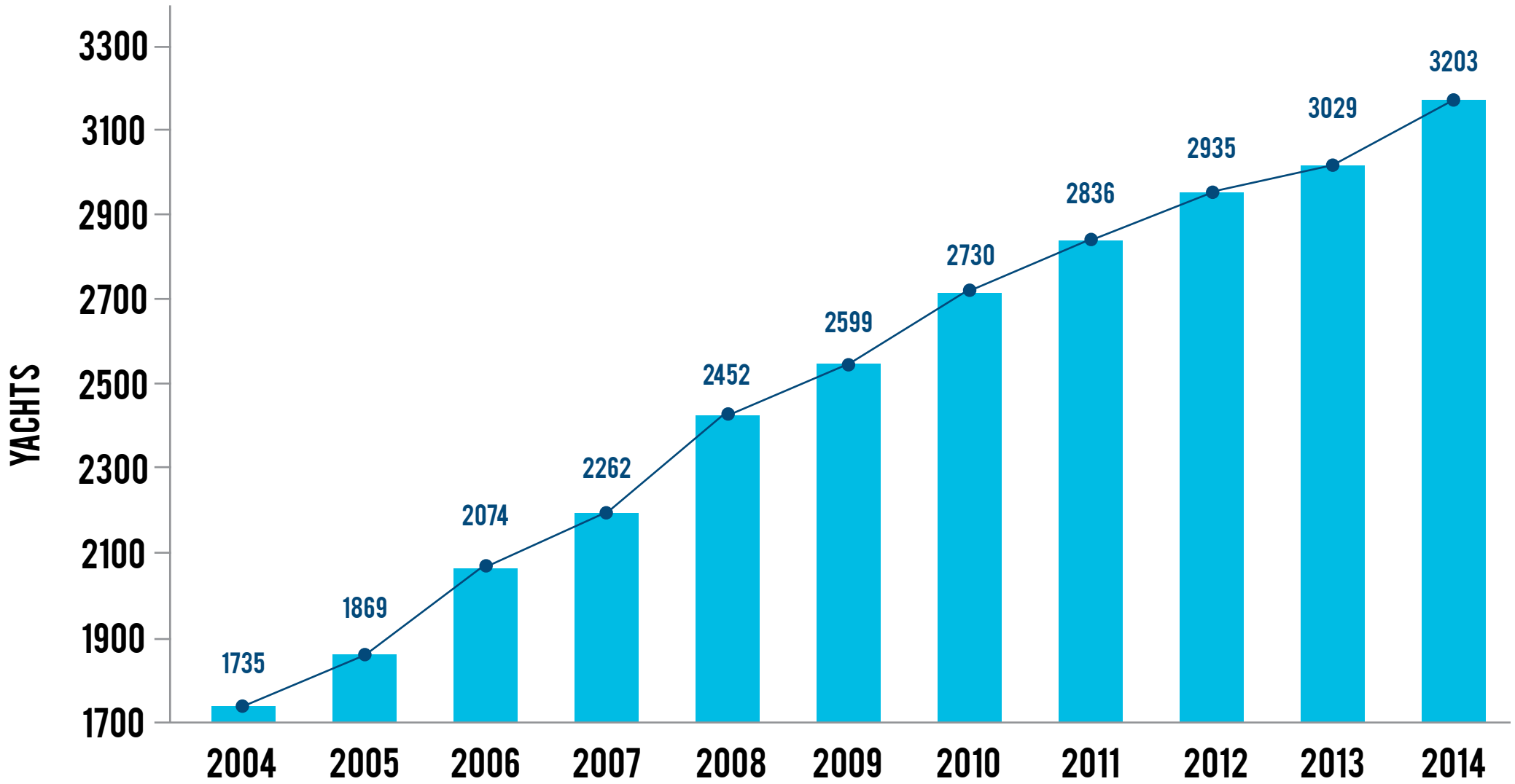
SECTION 1

THE GLOBAL FLEET

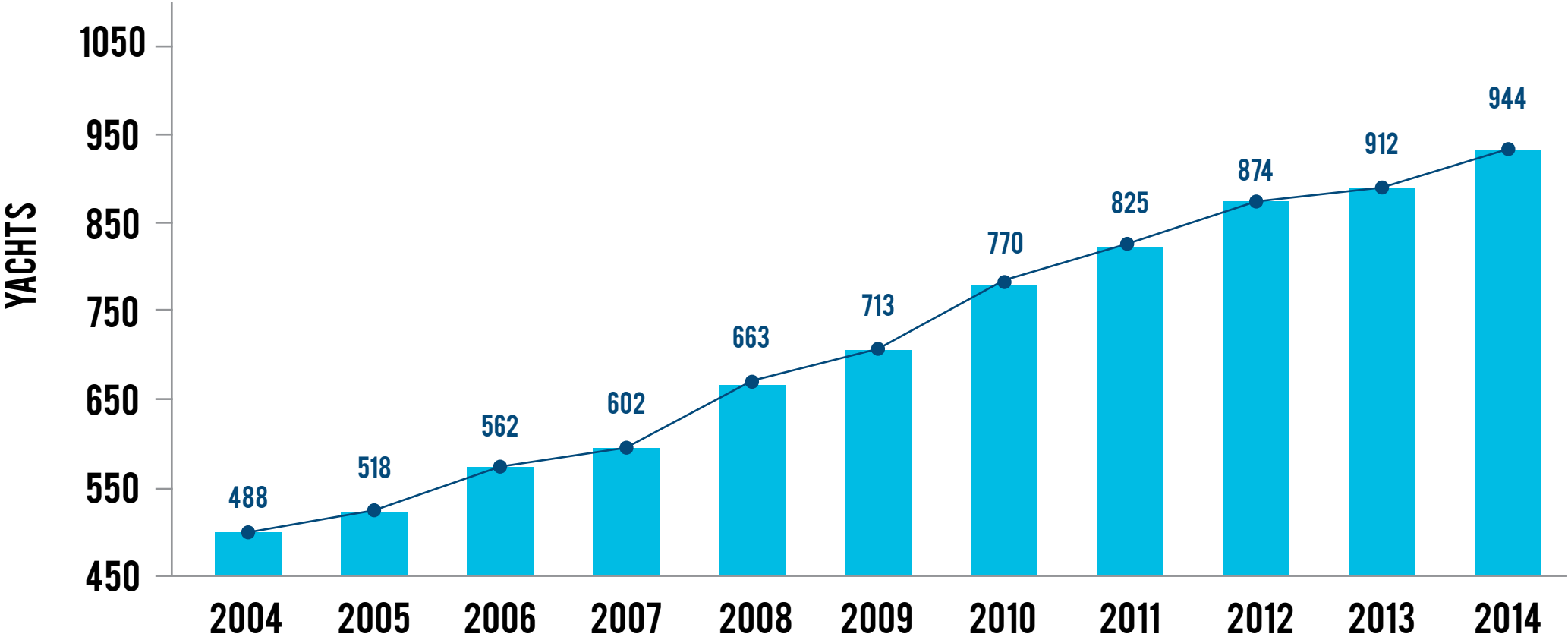
TOTAL FLEET



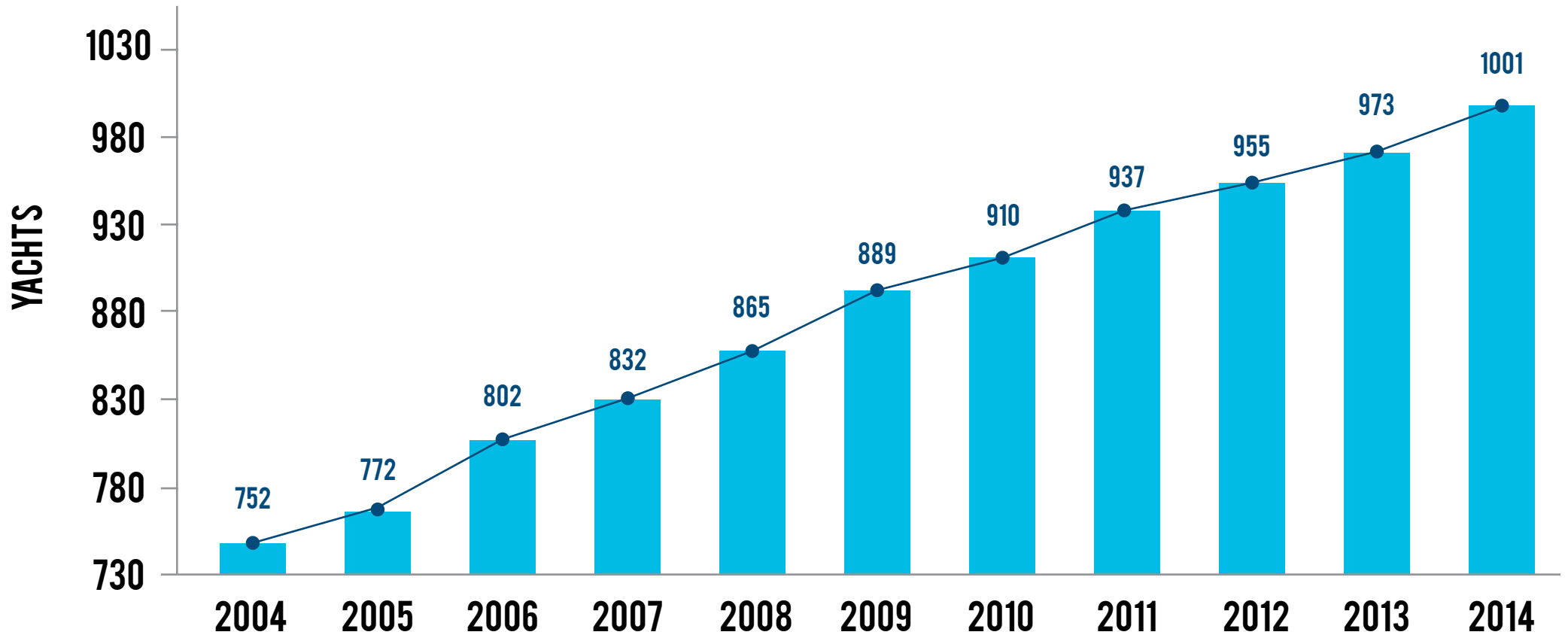
MOTOR YACHTS, 30-45M



MOTOR YACHTS 45M+



SAILING YACHTS



SECTION 2

ITALY STILL RULES THE WAVES

30-45M MOTORYACHT DELIVERIES, 2014

BUILDER	NO. OF YACHTS	AVERAGE LOA
AZIMUT - BENETTI	13	35.21
SANLORENZO	12	35.52
CUSTOM LINE	8	32.25
GULF CRAFT	6	33.20
ITALIAN SEA GROUP	5	41.38
SUNSEEKER	5	36.93
WESTPORT	4	36.85
OCEAN ALEXANDER	4	30.10
HORIZON	3	36.97
ISA	2	43.45

45M+ MOTORYACHT DELIVERIES, 2014

BUILDER	NO. OF YACHTS	AVERAGE LOA
BENETTI	4	53.7
HEESEN	4	48.5
LURSSEN	3	88.4
AMELS	3	58.5
OVERMARINE	3	48.43
CRN	2	67
ISA	2	60.45
FEADSHIP	2	53.28
PALMER JOHNSON	2	45
PERINI NAVI	1	73

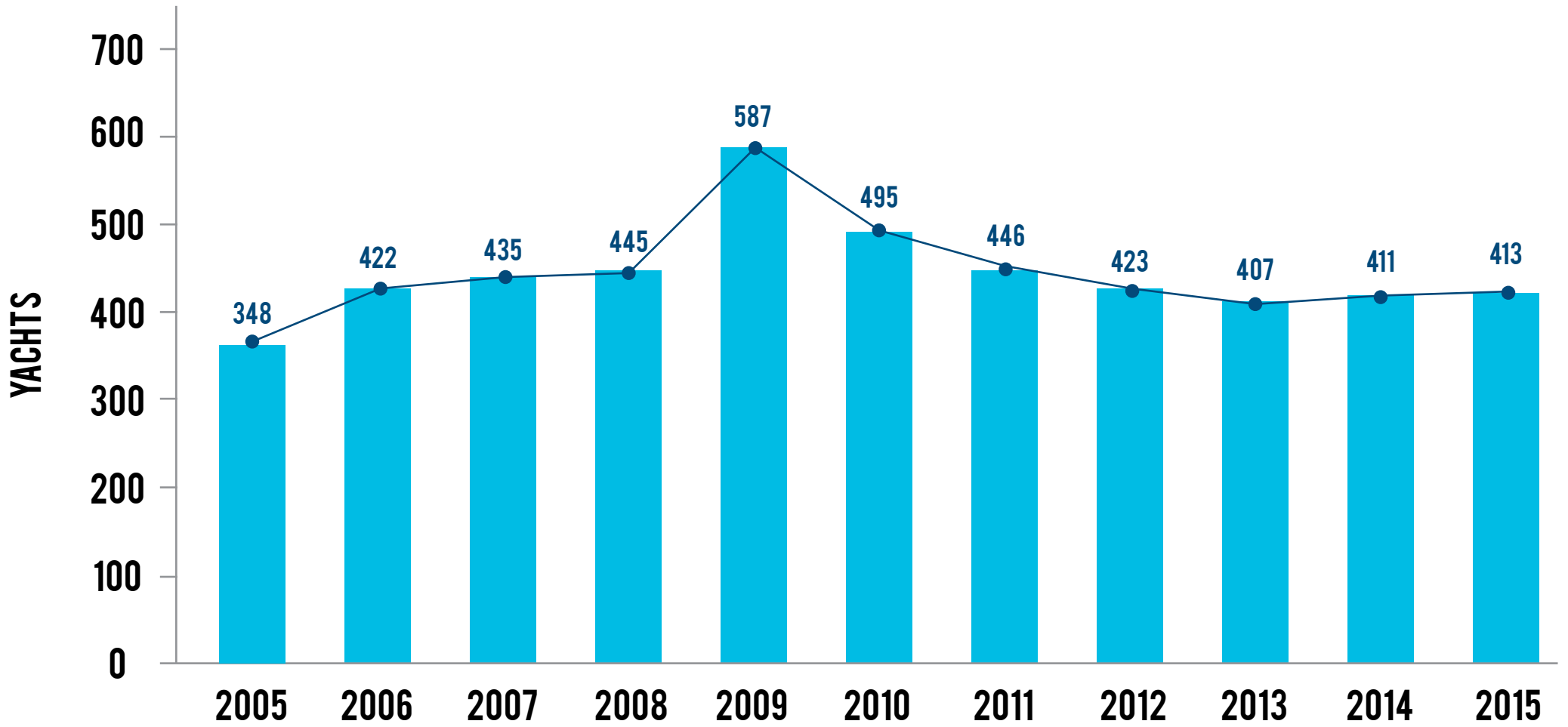
SAILING YACHTS DELIVERIES IN 2014

BUILDER	NO. OF YACHTS	AVERAGE LOA
ROYAL HUISMAN	2	49.82
BALTIC YACHTS	2	33.25
PERINI NAVI	1	60

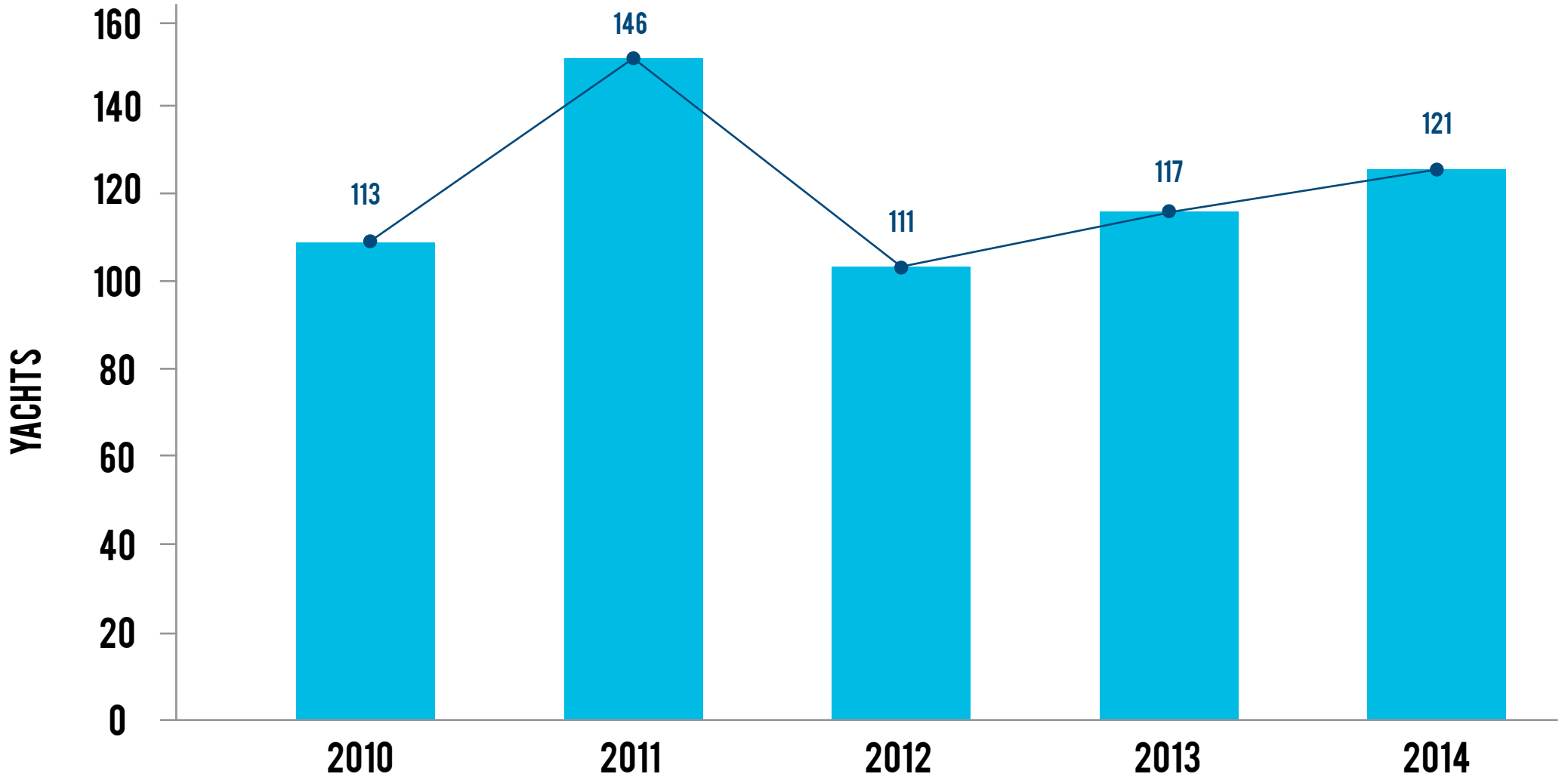
SECTION 3

THE LAST DECADE

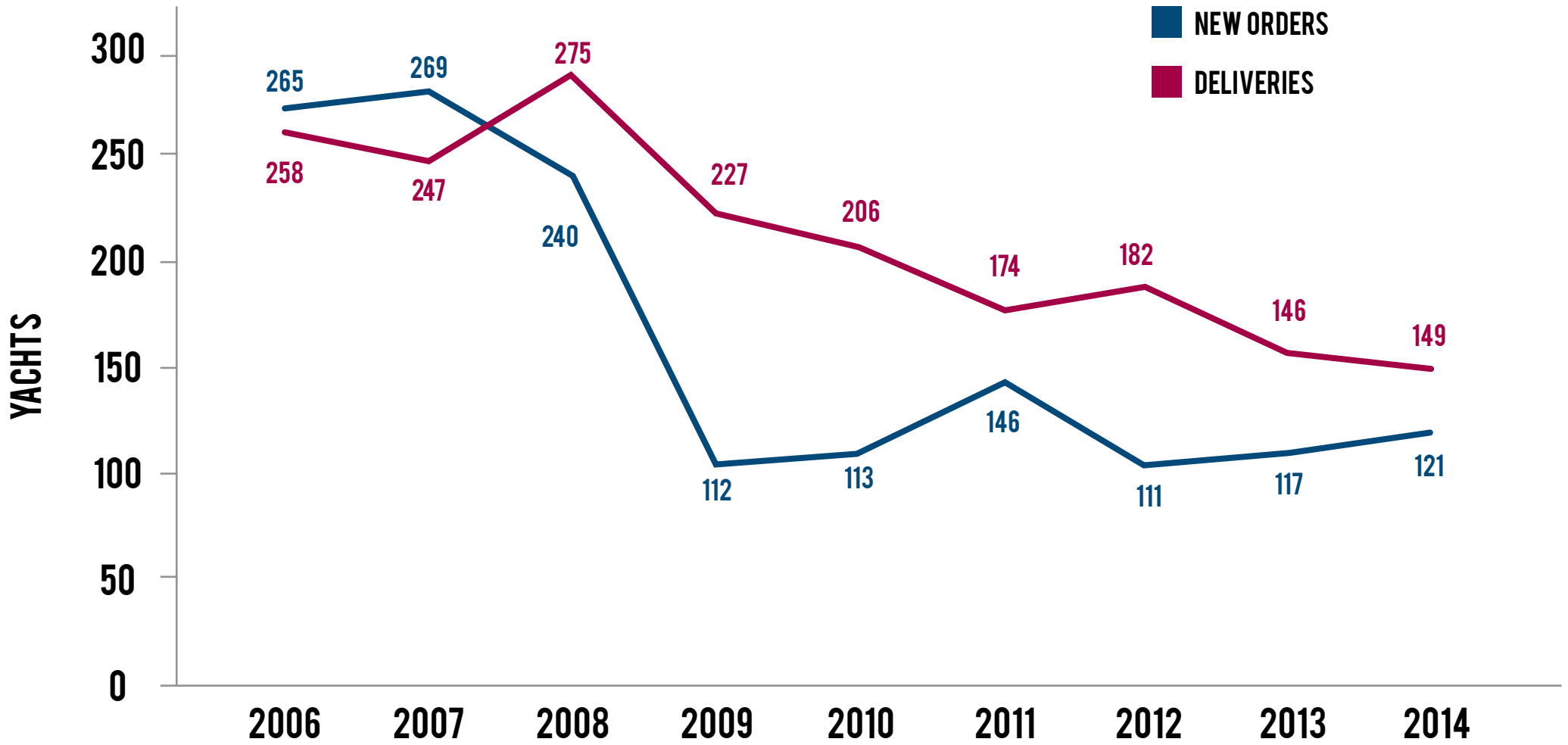
SIZE OF THE ORDER BOOK



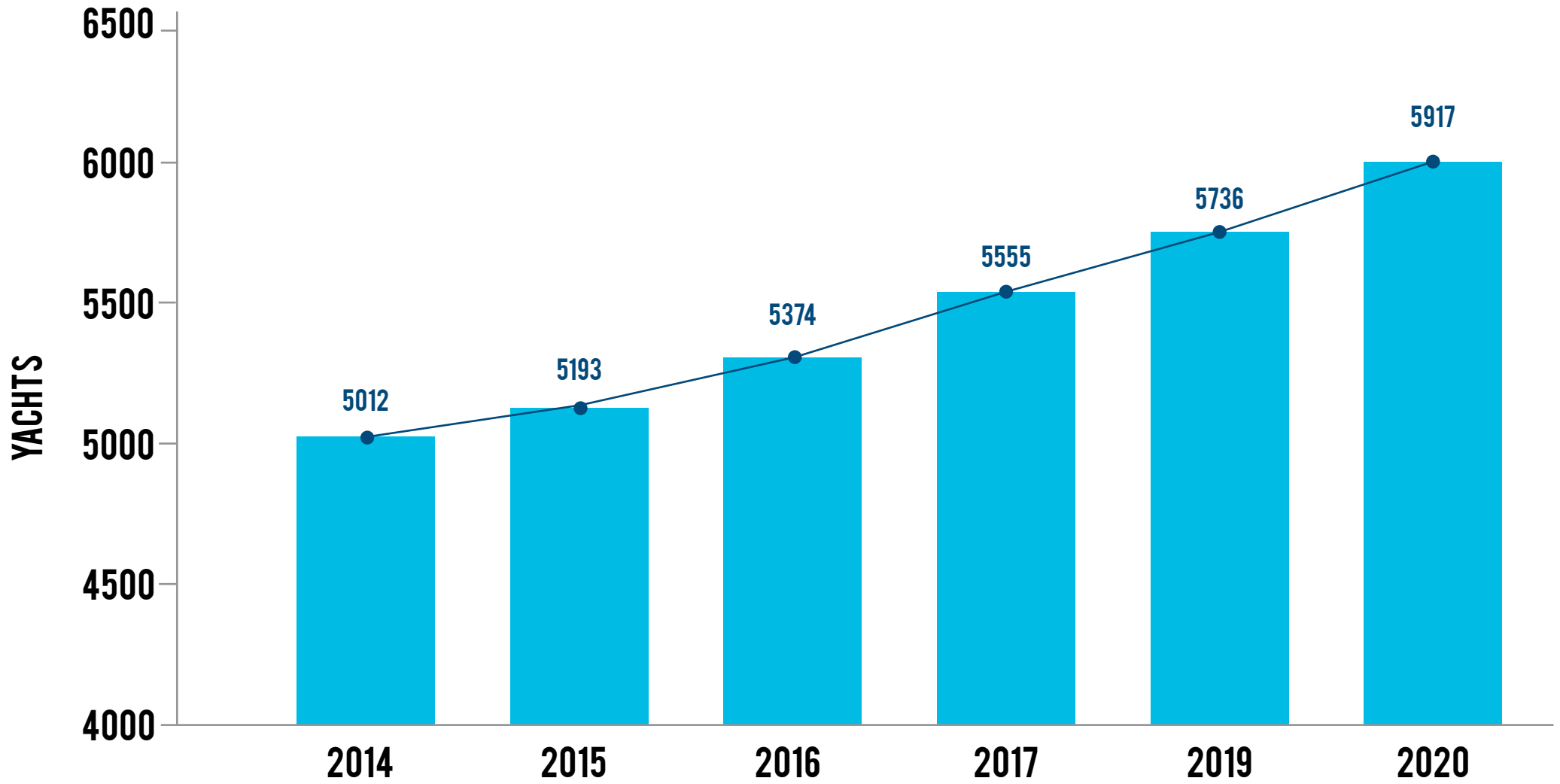
NEW ORDERS



NEW ORDERS VERSUS DELIVERIES

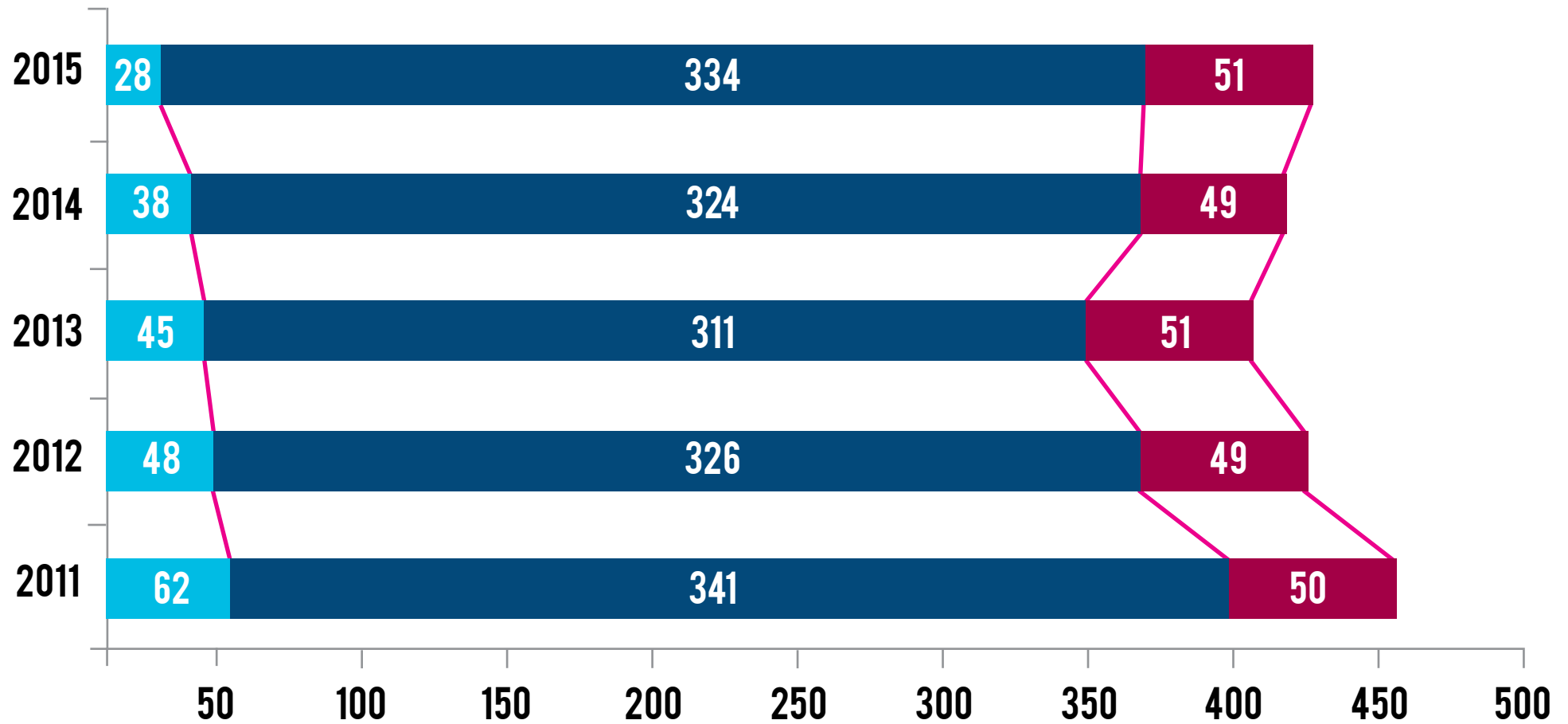


PREDICTED FLEET GROWTH

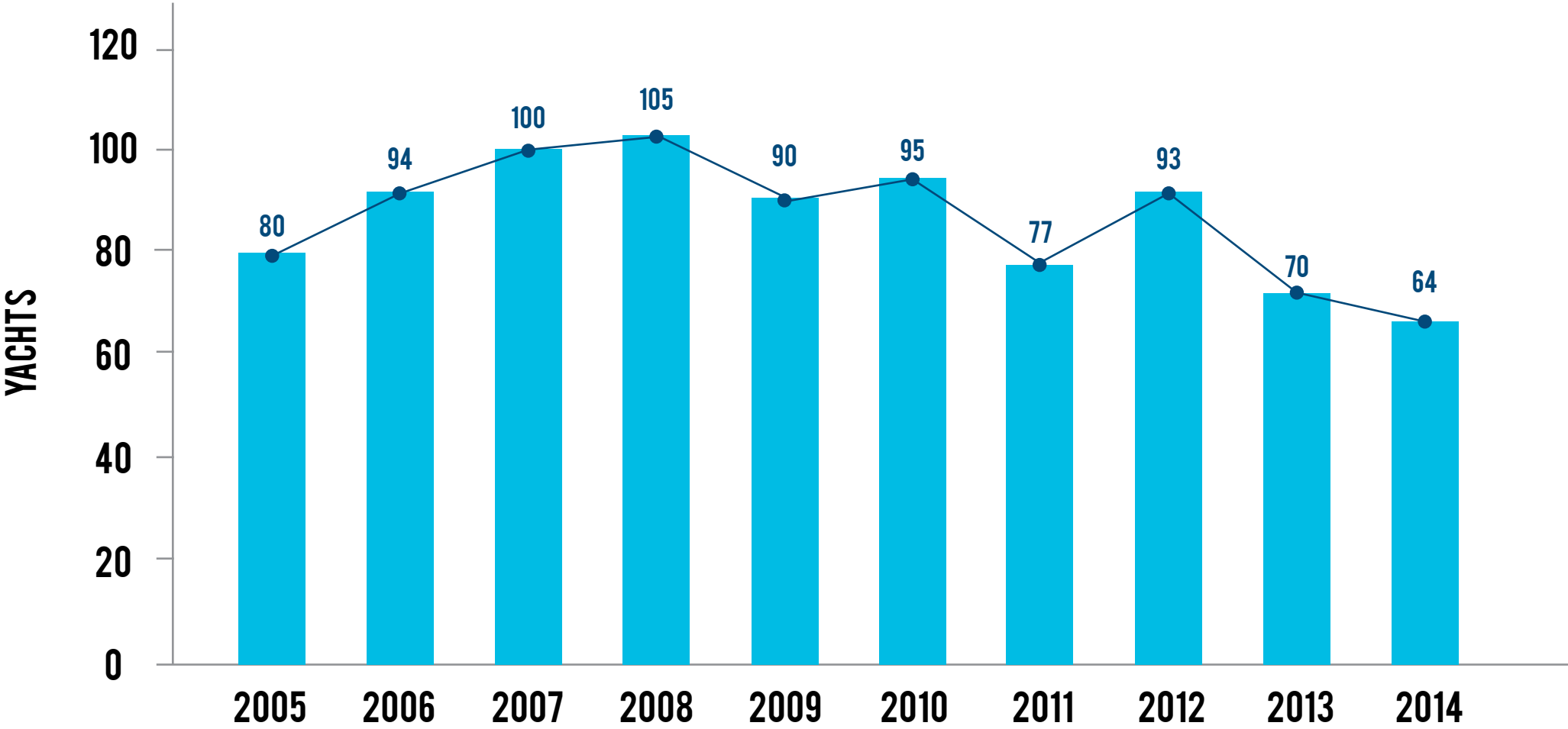


ORDER BOOK BY REGION

AMERICAS EUROPE ROW



NUMBER OF BUILDERS MAKING DELIVERIES

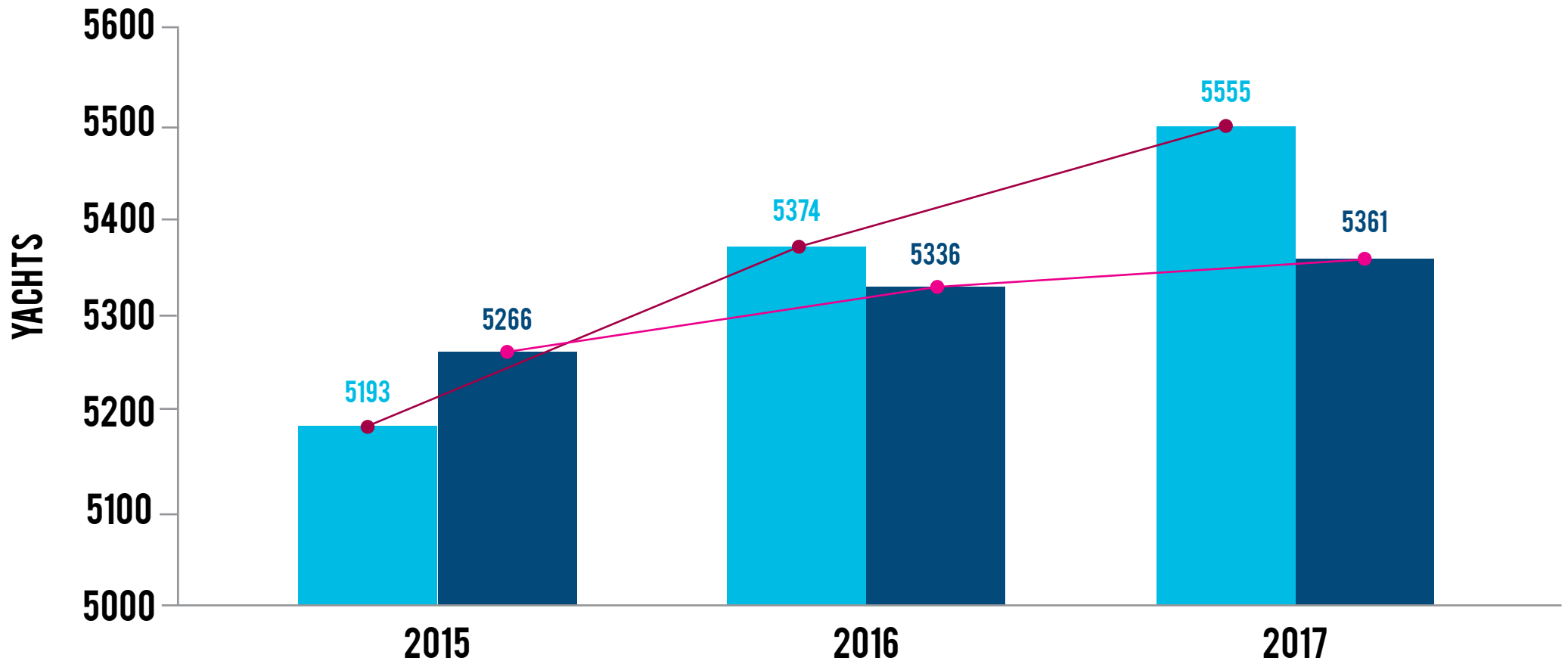


SECTION 4

LOOKING FORWARD

PROJECTED DELIVERIES

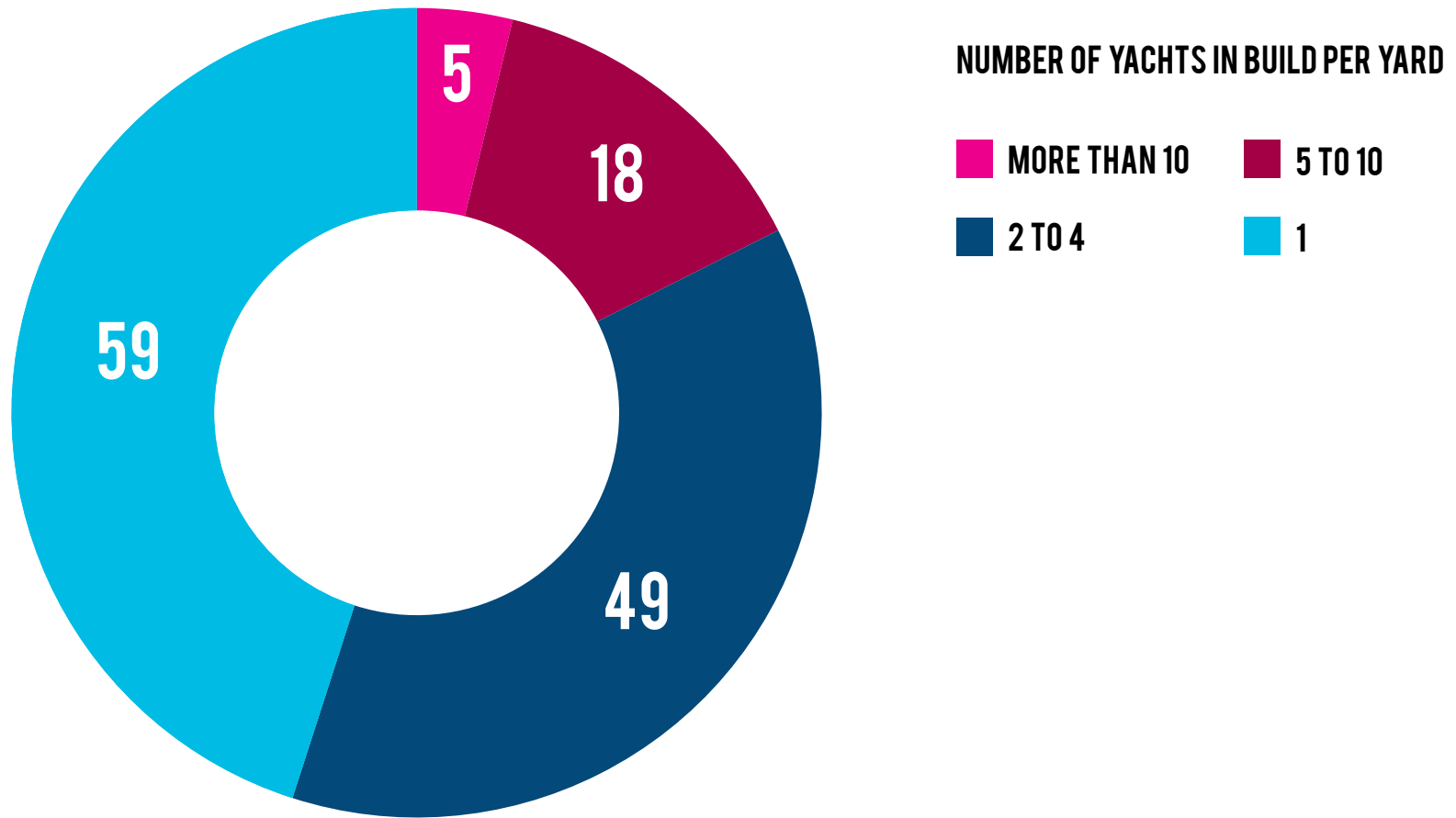
■ EXTRAPOLATED 5-YEAR HISTORICAL AVERAGE **■** ACTUAL SCHEDULED DELIVERIES



YACHTS IN BUILD

TOTAL GOB	413
NUMBER OF BUILDERS	131
AVERAGE NUMBER OF YACHTS PER YARD	3.1

PROJECTS PER SHIPYARD



SECTION 5

NUMBERS TO REMEMBER

413

**TOTAL GLOBAL
ORDER BOOK**

45.09

**AVERAGE LOA OF
2014 DELIVERIES**

49.30

**AVERAGE LOA OF
YACHTS IN BUILD**

604.00

**AVERAGE GT OF
2014 DELIVERIES**

122

**NUMBERS OF ORDERS
PLACED IN 2014**

149

**NUMBERS OF
DELIVERIES IN 2014**

6,718.32

**TOTAL LOA OF
DELIVERIES MADE IN 2014**

64

**NUMBER OF YARDS
MAKING DELIVERIES IN 2014**

FOR A COMPREHENSIVE OVERVIEW:

THE SUPERYACHT INTELLIGENCE
ANNUAL REPORT 2015

WWW.SUPERYACHTINTELLIGENCE.COM